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ESTIMATE OF 1979/80 WORLD COFFEE CROP DOWN 700,000 BAGS

SUMMARY

The fourth USDA estimate of the 1979/80 world coffee crop is 81.1 million bags (60 kilograms each), down 700,000 bags from the third estimate but 3.4 percent larger than the 1978/79 outturn. Based on past performance, the chances are that the fourth estimate of total production will not vary by more than 4.7 percent from the final outturn for the year.

Exportable production, which represents total harvested production less domestic consumption in producing countries, is estimated at 61.1 million bags, or 2.9 percent higher than the 1978/79 estimate of 59.3 million bags.

In North America, the production estimate has been decreased by about 600,000 bags. The largest reduction, 250,000 bags, occurred in the estimate for Guatemala, although the final production figure could be 100,000 to 200,000 bags higher as a result of unreported early harvestings. Downward revisions in the production estimates of Costa Rica, the Dominican Republic, Mexico, and Nicaragua account for most of the balance of the lower estimate. These changes are generally weather-related.

Estimates for all South American countries remain unchanged for 1979/80; however, the 1978/79 estimate for Colombia has been increased by 400,000 bags to account for larger-than-expected year-end stocks.

Total African production in 1979/80 has been lowered by 332,000 bags from that previously reported. Because of an extended period of cool, cloudy, and rainy weather in late 1979, Ivory Coast is now expected to harvest less than 4.2 million bags this year, 500,000 bags below last year's total. The estimate for Kenya has been increased by more than 140,000 bags, while increases of 80,000 bags each were registered for Cameroon and Ethiopia.

The only Asian change is for India, which has been raised by about 70,000 bags.

The estimate for Oceania is unchanged.

PRODUCTION

North America

The North American 1979/80 coffee crop is estimated at 14.8 million bags, with exportable production estimated at 11.3 million. All of the major revisions from the preceding estimates were downward, led by Guatemala with a decrease of 250,000 bags because of heavy rains during the harvest.

For 1978/79, total North American production is estimated at 16.1 million bags, while exportable production is estimated at 12.8 million bags.

Costa Rica's 1979/80 coffee production is estimated at 1.54 million bags, down slightly from the third estimate. This decline is attributed to the intensive rainy period in some areas that caused some beans to fall and increased the incidence of fungus diseases. As of January 30, approximately 84 percent of the estimated production had been harvested. There is no change in the estimate for the 1978/79 crop.

According to the Coffee Office, export contracts for 1979/80 crop coffee through January totaled 713,000 bags with an average value of \$3.65 per kilogram, or \$160 million in total value.

The Government-regulated domestic prices for roasted ground coffee containing 12 percent sugar are as follows: Wholesale 6.50 colones per 500 grams (\$0.69 per pound) and retail 7.25 colones per 500 grams (\$0.77 per pound). Prices for roasted coffee without sugar added are unregulated. This coffee was being sold at 17 to 20 colones per kilogram (\$0.90-\$1.06 per pound), depending on quality. The auction price for green coffee for the domestic market during October 1979-January 1980 averaged 9.05 colones per kilogram (\$0.48 per pound).

The 1979/80 coffee crop in the Dominican Republic is now estimated at 670,000 bags, roughly the same level as in the preceding year but well below expectations prior to Hurricanes David and Frederick. It is estimated that 10 percent of the country's total coffee tree population was lost as a result of the storms; however, the most lasting hardship, reportedly, is the damage to the farm road system, which has caused normal market outlets from some producing areas to be almost inaccessible.

Coffee exports for 1979/80 are forecast at 390,000 bags, only slightly below shipments a year earlier but barely half the export volume of 1977/78. Projected earnings from coffee in 1979/80 are \$85 million, compared with \$65 million last year.

Domestic consumption in 1978/79 is estimated at 280,000 bags, green equivalent, and is not likely to change much during the current year. Despite the Government's efforts to establish a retail domestic price of \$1.72 per pound, local prices were running below this level.

Lack of new information caused in part by internal difficulties is the primary reason El Salvador's coffee production for 1979/80 remains estimated at 2.7 million bags, down rather sharply from the revised estimate of 3.4 million bags for 1978/79. Reportedly, harvesting crews in some coffee areas have made only one picking, rather than three or four, as is usually the case.

The National Coffee Institute (INCAFE) will buy all coffee offered by producers, and will make an advance payment to be followed by a final settlement after the entire crop is sold. Individual producers and cooperatives will retain the right to process and sell their own coffee to the domestic market. An advisory council to INCAFE will be established and will include representatives of producers, processors, coffee associations cooperatives, and -- for the first time -- field workers and mill laborers.

On January 2, 1980, INCAFE took over the responsibilities, assets, and offices of the Salvador Coffee Company, thus nationalizing coffee exports. Henceforth, INCAFE will be in charge of export marketing. The former National Department of Coffee was renamed the Department of Control and Registration, and will retain control of export registrations.

Recent data on exports remain unavailable. Exports registrations were closed from early November 1979 through mid-February 1980. In addition to labor problems, financial constraints during 1980 may result in lower levels of field maintenance, fertilizer usage, pruning activities, and containment of coffee rust.

Haiti's coffee production estimates for 1979/80 and 1978/79 have been revised slightly to 650,000 bags and 468,000 bags, respectively. If the present export trend continues, total 1979/80 shipments could reach 400,000 bags. This would be well above 1978/79 exports of 236,000 bags, mainly because of the larger 1979/80 crop.

The average price received by exporters during the latter part of December 1979 for unwashed green coffee was approximately \$1.70 per pound, f.o.b., while washed coffee sold for \$1.94. Prices were beginning to weaken by the third week of January 1980.

Haitian authorities suspect from 30,000 to 100,000 bags of the current crop are being smuggled into the Dominican Republic because of more favorable price and marketing conditions there.

Guatemala's 1979/80 crop is now estimated at 2.55 million bags, based largely on the latest figures received from the National Coffee Office (ANACAFE). It is believed final production figures could be 100,000 to 200,000 bags higher because of unreported early harvestings.

There is no change in the officially reported area planted to coffee in recent years, which is placed at 248,000 hectares. However, some new coffee plantings reportedly have been made in the newly opened areas of Polochic and Transversal, and some expansion in the old plantations is believed to have taken place.

The Government has announced that coffee is on the list of approved crops being planted on lands it is now distributing under land reform programs. No data are available on the extent of these plantings, but Guatemala's production will be augmented as these new areas begin bearing fruit.

Numerous efforts are being made by national and international agencies to prevent the spread of coffee rust now present in El Salvador. Field personnel of ANACAFE have been canvassing coffee plantations near the El Salvador border to detect any signs of coffee rust. In addition, the Government is carrying out a fumigation control program at the border, and is confiscating possible spore-carrying products.

Coffee production in Honduras in 1979/80 remains estimated at 1.25 million bags, 10 percent larger than the 1978/79 outturn. Except for heavy rains in September and December that caused some berry drop, the 1979/80 crop was produced under virtually ideal conditions. Also, the crop matured earlier than usual. Reportedly, producers were not able to obtain sufficient financing for harvesting their coffee, and consequently some sold their crops early to pay production and harvesting costs.

According to the Honduran Coffee Institute (INCAFE), calendar 1979 exports totaled 1,100,975 bags of 60 kilograms, valued at \$197 million. The export tax on this coffee earned over \$30 million in foreign exchange. During October-December 1979, exports totaled 154,036 bags, and total 1979/80 exports are expected to reach 1,150,000 bags, or about 100,000 bags over 1978/79 shipments.

INCAFE expects a continued increase in coffee production during the next few years as recent plantings come into full production. Since coffee rust exists in Nicaragua and El Salvador, INCAFE expects the disease eventually to spread to Honduras. A special committee has been established to formulate a program to combat the spread of coffee rust, and will likely recommend a containment program that includes quarantine spraying.

Total coffee production in Jamaica is still forecast at around 35,000 bags. Because of unusually heavy rainfall, much of the crop ripened at the same time with a higher-than-normal moisture content. Despite proper drying and curing, some off-color beans have been detected.

The Coffee Board is currently appraising a loan proposal by the U.K. Commonwealth Development Corporation (CDC) to develop 3,000 acres of new coffee lands in the Blue Mountain area. Reportedly, the Board will own and operate at least 1,200 acres of the total.

The coffee production estimate for Mexico has reverted to the original 3.8-million-bag level of 1979/80. Interim estimates by both Government and trade sources for a larger crop now appear to have been overly optimistic. Producers had been expected to maximize their harvests, possibly keeping old trees in production and intensifying their picking as a carryover effect of the high prices of 1978/79. Lower returns to producers in 1979/80 apparently reduced those incentives. The minimum producer support price remains unchanged from 2,600 pesos (\$115) per quintal (100 kg) for parchment and 10.25 pesos (\$0.45) per kilogram for cherry coffee prices set in mid-November 1979. Output of 3.8 million bags would mean a yield of about 10.7 bags per hectare on 356,000 hectares.

It now appears that tighter Government control over the coffee marketing system will insure coffee exports for the current year will fall substantially below the 3.03 million bags exported during 1978/79, perhaps to 2.5 million bags or less. The 1978/79 level could not be maintained without depleting stocks and/or domestic consumption to unacceptably low levels. Exports depend on how competitively the Mexican Coffee Institute (INMECAFE) sells coffee on the world market. The \$1.90-per-pound minimum export price in effect as of mid-February did not make Mexican coffee very competitive.

With the marketing year half way through the second quarter, exports totalled only about 0.5 million bags, well below the 1 million bags shipped during the same period last year and well below the 0.95 million bags permitted through March under INMECAFE's export quota system.

Mexican coffee exports of 2.09 million bags in crop year 1979 earned \$570 million. At \$400 million or 70 percent of total exports, coffee represented the largest single agricultural export item to the United States for the year.

Domestic consumption for 1979/80 is estimated at 1.3 million bags, up 0.1 million bags from 1978/79. For the most part, nonexportable lower grade coffees are consumed domestically. In an effort to reduce the domestic subsidy to consumers, retail prices for exportable coffee were reduced in December 1979 for the first time since 1977. The new wholesale and retail prices, in pesos per kilogram, for Prime Washed are as follows:

<u>Wholesale</u>		<u>Retail</u>	
Old	New	Old	New
Peso/Kilogram			
62.8	78.29	73.90	90.00

Domestic roasters would like a further increase, because they contend the new prices still do not cover costs.

Nicaragua's 1979/80 crop estimate is reduced to 850,000 bags, or 110,000 bags below that previously carried. Reportedly, excessive rainfall during September-November 1979 was the major reason for the lower estimate. Also, the coffee crop matured more rapidly and earlier than usual, with the result that there was insufficient labor to maximize the harvest. The heavy and prolonged rainfall, followed by cloudy weather, not only caused substantial droppage of coffee cherries, but also prevented proper drying of parchment beans.

During October-December 1979, exports of green beans were reported at 139,920 bags. Based on present crop estimates and indicated domestic consumption needs, Nicaragua may have about 765,000 bags for export during the 1979/80 marketing year. For 1978/79, Nicaragua's exports were reported at 942,605 bags of green beans and about 14,000 bags of soluble coffee, green equivalent.

For 1979/80, ENCAFE (Empresa Nicaraguense del Cafe) has established a system of daily producer prices for prompt or future deliveries. The producer price is based on the New York price minus charges and taxes. For example, on January 9, 1980, good washed coffee for January delivery was quoted at \$172.50 per 46 kilograms. In this case, the producer would receive \$130.15, f.o.b. Nicaraguan port, for green coffee, or \$56.20 to \$56.80 per 46 kilograms for parchment coffee delivered to ENCAFE purchase centers. Producers have been guaranteed \$100 per 46 kilograms, f.o.b. port.

The preliminary production estimate of the 1979/80 Hawaiian coffee crop is 1,800,000 pounds, parchment basis, up 7 percent from the previous year's harvest despite a drop in harvested area reported by the Hawaiian Agricultural Reporting Service. Unlike the year before, when drought conditions affected the early flowering stage, weather was generally more favorable for inducing normal bloom. While rainfall was adequate and kept orchards in fair to good condition, growers in some sections indicated moisture may have been excessive, especially at the higher slopes, thereby affecting berry quality.

Growers have been receiving an average price of \$1.45 per pound for parchment coffee, a price exceeded only by the \$1.85 per pound received for the 1976/77 crop. Total area dropped to 2,100 acres, of which 1,800 were in harvest.

South America

South American coffee production in 1979/80 is unchanged from the previous estimate at 38.9 million bags, up 8 percent from the 1978/79 total. Exportable production in 1979/80 is estimated at 27.3 million bags, up more than 8 percent over the preceding year's level.

Bolivian coffee production for the crop year 1979/80 is estimated at 130,000 bags, up about 6.5 percent from 1978/79's total. Growth in output has been limited by low returns to producers (about 5 pesos, equivalent to 20 U.S. cents per pound for parchment). Heavy rains early in 1979 apparently had no effect on outturn.

Bolivia's coffee area is estimated at slightly more than 17,000 hectares.

The Coffee Grower's Association (ANPROCA) believes coffee production could decline 25 percent over the next 5 years if adequate measures are not taken to control the spread of coffee rust. Budgetary and other restraints apparently limit the Ministry of Agriculture's ability to mount a major control program. Rust-resistant varieties are not being used.

Exports of coffee from Bolivia for April 1979-March 1980 are expected to total 125,000 bags, up substantially from the 95,000 bags exported during the previous crop year. The increase may be a result of the change in Government policy requiring that only 18 percent of production be held for domestic consumption. With consumption moving up slightly, substantially higher exports during 1979/80 may result in a stock drawdown and reduced exports next year. Official 1979 coffee exports were valued at \$18.8 million, or about 2.4 percent of total export earnings.

Brazil is making rapid progress in recovering its coffee production potential, which was drastically reduced by the July 1975 freeze. In 1974, Brazil produced 28-30 million 60 kilogram bags. In 1976/77, production dropped to less than 10 million bags. The freeze affected, in various degrees, more than one-third of Brazil's 2.6 billion coffee trees. Government financial and technical support to growers, as well as favorable weather, contributed to the recovery of Brazil's coffee production potential. Based on continuing favorable weather for the growth of coffee cherries since last December, the fourth and final USDA estimate for the 1979/80 Brazilian coffee crop is 22.5 million bags. However, in order to insure a good quality harvest, dry weather will be needed during the May-July period. The harvest, which normally begins in April, can extend into September in some areas.

During calendar 1979, Brazil's coffee exports totaled about 12 million bags, earning the equivalent of more than \$2.1 billion. This compares with 12.6 million bags exported during 1978, earning \$2.3 billion.

Brazil's coffee exports have gained a significant price advantage since last February 11, when the Brazilian Coffee Institute (IBC) substantially reduced the minimum export price and allowed price discounts to foreign roasters. Because export commitments for shipment through April were close to the rate needed to achieve the 15-16 million-bag export target for 1980, Brazil revised its minimum export price upward. The applicable resolutions, their minimum export registration prices for green, roasted, or roasted and ground coffees, and their effective dates are as follows:

	Resolution 02/80, for Shipments Feb. 11 - Apr. 30, 1980	Resolution 04/80, for Shipments Feb. 28 - Apr. 30, 1980	Resolution 09/80 for Shipments Mar. 11- May 31, 1980
	<u>U.S. dollars per pound</u>		
Coffees type 6 or better, free from Rio Zone flavor, shipped through Santos.	1.70 ^{1/}	1.80	1.90
Coffees type 7 or better, free from Rio Zone flavor, shipped through Paranagua, Rio de Janeiro, Vitoria, Salvador/ Ilheus, and Recife.	1.68 ^{2/}	1.78	1.88
Coffee type 7 or better, Rio Zone flavor, shipped through Rio de Janeiro, Vitoria, Salvador, and Recife.	1.55 ^{3/}	1.65	1.75
Coffee type 7/8 or better, Robusta/Connilon, shipped through Salvador/Ilheus	1.45 ^{4/}	1.55	1.65

1/ From \$2.05. 2/ From \$2.00. 3/ From \$1.90. 4/ From \$1.80.

IBC Resolution 03/80 fixed at US \$101.00 (from \$147.00) the contribution quota on green or decaffeinated coffee per 60.5 kg-bag for shipments made February 11-April 30, 1980. The level of the quota was extended beyond April 30 by Resolution 09/80 of March 10.

The 1980 resolution set minimum registration prices as follows:

Resolution 05/80 Effective Feb. 28 - April 30, 1980	Resolution 06/80 Effective Mar. 4 - April 30, 1980
<u>(U.S. dollars per pound)</u>	
4.75	5.30
5.75	6.30

IBC Resolution 01/80 fixed the contribution quotas at \$2.57 and \$2.55 per pound, respectively, for spray and freeze-dried coffee for shipments

made from January 8 to March 31, 1980. Effective February 28, 1980, the contribution quotas were extended to cover shipments made through April 30, 1980. The objectives of the current Government coffee policy are to maximize foreign-exchange earnings from coffee exports, limit 1980 coffee exports to 15 million bags, and encourage proper farm management and recovery of frost-damaged trees.

For Colombia, the production estimate given in FAS coffee circular, FCOF 1-80 is unchanged for 1979/80 at 12 million bags, down slightly from the 1978/79 harvest.

Heavy rains and earthquakes during November and December 1979 damaged some trees and roads in the affected areas, but the overall effect on future production is not likely to be excessive. Rising labor costs, and pesticide and fertilizer prices, coupled with a decline in world coffee prices, could be important deterrants to increased production in the longer term.

The Coffee Growers Federation (CGF) expects to have preliminary results of the coffee census by the end of 1980, thereby permitting an evaluation of tree age, variety, and density changes that have occurred in the coffee producing areas over the past 10 years.

Area planted to high-yield varieties has now reached 285,000-300,000 hectares, and reportedly accounts for 58-60 percent of total production. The new coffee variety known as Colombia, with high yields and good resistance to coffee rust, is becoming the preferred variety for new plantings replacing the Caturra variety.

Official coffee exports amounted to 2.6 million bags during October-December 1979. This is down 12.3 percent from exports in the first quarter of 1978/79, and reportedly is partially the result of more competitive pricing by Brazil. Estimated official exports for the 1979/80 marketing year are unchanged at 10 million bags. Once again, the CGF was the sole exporter.

Soluble and freeze-dried coffee exports for 1978/79 were revised upward to 145,947 bags of 60 kilograms each, based on complete data from CGF. The current estimate for 1979/80 is 150,000 bags.

Partly as a result of meetings between Government officials and growers during the 38th Coffee Congress, the official domestic price to growers was increased by 200 pesos to 8,300 pesos (\$186) per carga of 125 kilograms of parchment coffee on December 14, 1979.

On February 22, the CGF increased its resale price to private exporters by 6 cents to \$1.85 per pound, ex-dock, U.S. ports. Also, the rebate to customers was increased from 17.11 cents per pound to 17.5 cents.

Retail consumer coffee prices were increased by 50 percent between November 1978 and August 1, 1979. Some further upward price adjustments are foreseen during the current calendar year, as the CGF seeks to narrow the gap between domestic and export prices by reducing the domestic subsidy.

A Rotatory Credit Fund for Coffee has been capitalized at 150 million pesos. The Monetary Board has also decided to open a special line of credit of 200 million pesos for coffee renovation. The Government, through the Agricultural Research Institute and the CGF, will invest 22 million pesos in a campaign aimed at coffee rust prevention and control in 1980. This is 40 percent above the amount invested in 1979 for the same purpose.

Peru's 1979/80 coffee production is estimated at 1.26 million bags. This is substantially higher than earlier predictions and is 15 percent larger than the revised production for 1978/79.

Favorable rainfall in most producing areas, high producer prices, improved cultural practices, and some new plantings beginning to bear are the major reasons for the high outturn in 1979/80. Also, a streamlined marketing program by ENCI has resulted in more timely payments to producers.

If coffee leaf rust does not adversely affect yields, the long-range prospects for production should continue to be favorable. Cooperatives have improved assistance programs to members, including training for farmers in combatting rust. They have also helped to construct roads within coffee growing areas to improve and speed transportation of the product to cooperative processing and storage centers. Cooperatives have also purchased their own trucks to expedite the movement of coffee to export ports.

Exports of coffee during April-March 1979/80 are estimated at 1.13 million bags, or 28 percent more than was shipped the previous crop year. April-December 1979 exports totaled 983,000 bags.

In calendar 1979, coffee exports totaled 1,157,825 bags valued at \$245 million, a record for both quantity and value, and continued as the leading agricultural earner of foreign exchange. The United States, as usual, was Peru's major customer, taking 922,789 bags valued at \$196 million, or 80 percent of total shipments--also a new high.

The quality of Peruvian coffee for export is said to have improved considerably in recent years. This is largely a result of efforts by cooperatives and the increased use of sorting equipment. ENCI claims that because of Peru's and Ecuador's different harvest season vis-a-vis Central American growths, they can supply fresh, washed Arabica coffees when other suppliers cannot.

New coffee export marketing regulations were recently decreed and give priority to cooperatives and individual producers to export coffee directly through ENCI. Furthermore, ENCI was given the exclusive right to export green and processed coffee. Finally, the Coffee Cooperative Bank will be established to give greater emphasis to marketing activities.

Coffee rust control is now a primary consideration of the Government. Although the disease has not yet proven to be as serious as was previously believed, extensive campaigns are being carried out through cooperatives to convince farmers of the potential danger and the need to employ rigid control methods. In September 1979, the Government created the National Coffee Rust Committee. A shortage of funds has impeded the development of an intensive program, however.

Africa

Total production in Africa in 1979/80 is estimated at 18.7 million bags, with exportable production placed at 16.1 million bags. This is nearly 6 percent more than total 1978/79 production, and more than 6 percent above the exportable quantity in 1978/79. Production is expected to increase in all of the major producing countries, including Cameroon, Ethiopia, Ivory Coast, Kenya, Uganda, and Zaire. The biggest increase--amounting to nearly 350,000 bags--should come in Uganda, which is recovering from ravages of the recent war.

Cameroon production in 1979/80 is estimated at 1.6 million bags, up 5 percent from the third estimate and 8 percent higher than the revised 1978/79 outturn. As there has been little, if any, increase in area planted to coffee, evidently yields have been increasing.

The Ministry of Agriculture, the National Produce Marketing Board, and SODECO (Society for the Development of Coffee) have all worked to provide adequate inputs of fertilizers and insecticides and extension assistance to farmers. Moreover, there were no unusual outbreaks of rust or insect infestations, and the weather has been generally favorable.

Cameroon produces both Robusta and Arabica type coffees, with Robusta accounting for about three-fourth of total output in recent years. The area planted to Robusta and Arabica coffees is currently estimated at 250,000 and 100,000 hectares, respectively.

Both cocoa and coffee are major sources of foreign exchange for Cameroon, and the Government is stressing rapid development of these sectors. Also, the recent bonus paid producers for good-quality coffee beans has given farmers additional incentive to produce desirable grades.

Coffee production in Ethiopia for 1979/80 continues to be estimated at 3.3 million bags, although there are mounting problems in delivering coffee to central markets for export.

Exports in the first 3 months of the coffee year (October-December 1979) totaled about 200,000 bags, or some 60,000 bags more than exports in the same period in 1978. About 80,000 bags of this volume was old-crop coffee that went to the Soviet Union, reportedly in payment of debts incurred under an assistance program.

Coffee deliveries to the Addis Ababa market, as of late January, showed some signs of improvement. However, some exporters believe Ethiopia's exports in 1979/80 may be as much as 10 percent below 1978/79 shipments. The newly appointed Coffee Minister has proposed closer cooperation between the Government and the private sector to help overcome some of the problems in the industry. Indications are that the Ministry of Coffee will reissue export licences --which it had revoked earlier-- to some of the larger exporting firms. Also, the Ethiopian Coffee Marketing Corporation, the marketing arm of the Coffee Ministry, reportedly will work closely with private export associations to increase exports and foreign exchange earnings.

Coffee production in the Ivory Coast during 1979/80 is estimated at less than 4.2 million bags, 668,000 bags below the third estimate and 11 percent less than in 1978/79. The harvest has been both late and reduced because of prolonged rains and cloudy weather last fall. Reportedly, the outlook for the 1980/81 crop is good at this early stage, with rainfall being adequate for good flowering.

As of the first week of February, coffee deliveries to processing points did not appear to exceed 833,000 bags-- about half the volume this time last year. Besides the lateness of the crop, there has been a shortage of transportation resulting from cocoa shipments during the past 3 months. As cocoa deliveries fall off, the transport problem should be alleviated.

Export sales of current crop coffee were suspended in December 1979, as world prices dropped below the level Ivory Coast officials considered reasonable. According to trade sources, sales made before the ban were around 1.4 million bags.

During January-August 1979, coffee exports totaled 3.04 million bags. Major markets were France, 24 percent; the United States, 19 percent; the Netherlands, 18 percent; United Kingdom, 9 percent; and Italy, 8 percent.

Some initial results of the Government's coffee rehabilitation program have been reported. In the Doloa area, 2,100 hectares are to be pruned over the next 2 years. This is only about 1.5 percent of the total area planted to coffee in this important producing region.

Production in Kenya is now estimated at 1.4 million bags, 11 percent above the third estimate for 1979/80 and 12 percent larger than the 1978/79 crop. Main crop deliveries to date have been heavy, especially from the societies and areas such as Meru, Muranga, and Embu. The only apparent constraint to growers is the increasing cost of chemicals for spraying. Reportedly, the trees as of early February appeared healthy and were flowering profusely.

Coffee production in Liberia is expected to reach 150,000 bags in 1979/80. Rainfall during the February/March flowering period was favorable, in contrast to the 1978/79 season, when only 137,000 bags were produced. Official sources indicated the price for first-grade Robusta was increased from 78 to 90 cents per pound, effective January 1, 1980.

Nigeria's 1979/80 coffee crop is estimated at 50,000 bags, the same as in 1978/79. The current crop is faced with the same weather problems as in the previous season, when heavy and prolonged rainfall increased the incidence of fungus diseases.

The local soluble coffee processing plant is said to have had a successful year in 1978/79. Imports, as estimated, increased to about 80,000 bags, green equivalent, during the same period. Exports of green coffee, as reported to the ICO, totaled 51,000 bags. Nigerian consumption in 1978/79 is estimated at 70,000 bags, green bean basis, and could increase to 73,000 bags in 1979/80.

The stated Government policies and programs for coffee are to increase production, but only as a minor cash crop, with no significant effort being made to boost crop potential.

At 166,000 bags, Sierra Leone's 1979/80 coffee crop is expected to be down sharply from last year's record output of 217,000 bags. This estimate comes as a surprise, because rains during the February/March flowering period were believed to be satisfactory. However, Sierra Leone has a history of poor coffee years following good years.

Producers prices for coffee have remained unchanged at 1747.20 leones per ton (75 cents per pound) since January 19, 1979. If Sierra Leone does not increase producer prices, the incentive for export smuggling to more lucrative bordering markets may increase.

Asia and Oceania

Total production of coffee in Asia and Oceania is estimated at 8.7 million bags in 1979/80, compared with 8.1 million 1978/79. The only Asian change is in the estimate for India, which has been raised by about 70,000 bags. Oceania is unchanged. Exportable Asian production increased 9 percent, while that for Oceania decreased by 4 percent from the 1978/79 level. The most important producers in these areas are Indonesia and India.

India's 1979/80 production estimate has been increased slightly to 2.3 million bags, and if realized would be a record. The crop may be slightly delayed this year, owing to late showers during October/November 1979. For 1978/79, production is estimated at 1.9 million bags.

Export allocations of the 1979/80 output are reported at 72,000 tons, or 1.2 million bags, with 867,000 bags allocated for domestic consumption. Coffee that does not enter the pool would be in addition to the official consumption figure.

Export demand for Indian coffee continues strong. On November 16, 1979, the Soviet Union reportedly signed the biggest contract ever with the Coffee Board for 15,500 tons (258,338 bags) of green coffee valued at 580 million rupees (\$71.2 million).

While the Indian Government reduced the export duty on coffee from 730 rupees per quintal to 570 rupees per quintal effective February 1, 1980, the impact is expected to be minimal, owing to the limited stocks available for shipment before the end of the current crop in September.

U.S. COFFEE TRADE

U.S. imports of green coffee during calendar 1979 totaled 19.4 million bags valued at \$3.8 billion, compared with 18.1 million bags valued at \$3.7 billion in 1978. In 1977 and 1976, the volume of green coffee imported was 14.8 million and 20.3 million bags, respectively. Imports of roasted and soluble coffee in 1979, on a green bean equivalent basis (GBE), totaled 2 million bags valued at \$337 million. Comparable imports of processed coffee

in 1978 were 1.6 million bags valued at \$306 million. For years 1976-1979, the average unit values per pound of green coffee imports, f.o.b. basis, were \$1.01, \$1.97, \$1.55 and \$1.49, respectively. During 1979, the average monthly unit import value declined slightly in December after reaching a peak at \$1.81 per pound in November. In January 1980, the average unit import price was at \$1.79 per pound.

In 1979, the 10 leading suppliers of green coffee to the United States (in 1,000 bags, with 1978 quantities in parentheses) were as follows: Colombia 3,891 (2,808), Mexico 1,934 (1,390), Brazil 1,890 (2,694), Indonesia 1,294 (1,176), Guatemala 1,268 (942), El Salvador 1,123 (627), Peru 954 (654), Ivory Coast 844 (775), Paraguay 759 (199), and Ecuador 638 (1,044).

The 10 largest suppliers contributed 75.2 percent of the green coffee imported by the United States during 1979. South America was the largest area of origin, with 42.7 percent of the total.

Total exports of green and processed coffee in 1979 (in GBE) were 596,000 bags valued at \$145 million, compared with 1978 exports of 428,000 bags valued at \$114 million. Reexports of green and processed coffee in 1979 (in GBE) were 1,185 million bags, compared with 1978 reexports of 770,000 bags.

According to U.S. Bureau of Census data, inventories of green coffee held by U.S. roasters, importers, and dealers on December 31, 1979, were 2,521,000 bags, up from 2,724,000 bags on September 30, 1979, and 8 percent higher than inventories held at the end of 1978. Total green coffee roastings in 1979 were 17.0 million bags, compared with 16.3 million bags in 1978 and 14.2 million bags in 1977.

Based on U.S. Bureau of Labor Statistics data, the wholesale price of a 1-pound can of roasted coffee during calendar 1979 averaged \$2.74, compared with \$2.86 in 1978 and \$3.52 in 1977. Similarly, the wholesale price of a 6-ounce jar of instant coffee averaged \$2.83 in 1979, \$2.86 in 1978, and \$3.26 in 1977. As of February 1980, the average wholesale price of a 1-pound can of roasted coffee was \$2.95, while the 6-ounce jar of soluble was \$2.70.

According to the ICO, the price of regular and soluble coffee in the United States increased to \$2.89 and \$8.76 per pound, respectively, in the fourth quarter of 1979--an increase of nearly 11 percent in the price of regular coffee and nearly 10 percent in the price of soluble coffee over levels prevailing in the third quarter of 1979. However, the average annual prices for regular and soluble coffee in 1979, \$2.47 for regular coffee and \$8.11 for soluble coffee, were below those for 1978--\$2.65 for regular and \$8.61 for soluble. Since 1975 the price of regular coffee in current terms has increased 12.8 percent while that for soluble coffee has increased 94 percent. Relative to its base in 1975, the index of the price of regular coffee in constant terms has increased from 175 in the third quarter of 1979 to 189 in the fourth quarter. Using the same base, the index of the price of regular coffee in constant terms was 168 in 1979, compared with 201 in 1978.

In the fourth quarter of 1979, 55.7 percent of the households in the United States purchased coffee, compared with 57.1 percent in the fourth quarter of 1978. In 1979, the number of households purchasing coffee decreased to 55.3 percent from 55.9 percent in 1978. In 1975, slightly over 61 percent of the households purchased coffee.

Purchases of coffee per household were on average about 3 percent more in 1979 than in 1978, increasing from 31.9 to 32.8 pounds of green equivalent. On a quarterly basis, purchases of coffee per household were 8 pounds in the fourth quarter of 1979, compared with 8.1 pounds in the same period of 1978.

OTHER DEVELOPMENTS

Under provisions of Resolution 302 of the International Coffee Agreement (ICA) of 1976, adopted at the 33rd Session of the International Coffee Organization (ICO) September 24-28, 1979, if the 20-day moving average composite indicator price falls below 168.27 cents per pound, an Executive Board meeting must be convened within 14 days. On January 28, 1980, the 20-day moving average indicator price fell to 167.20 cents per pound, and the Executive Director called for an ICO Council meeting of February 7 to examine the market situation and consider appropriate action, if any. While the participants at the meeting failed to agree on a specific course of action, a number of producing countries advocated implementation of the Agreement, including export quotas, as soon as possible. As a result, the Executive Board was scheduled to meet March 24-26 in London to consider, among other items, (1) a revision of the current trigger price of 77 cents per pound, (2) initiating export quotas, and (3) related economic provisions of the ICA. World coffee prices have since recovered.

The United States is concerned over the intervention in the coffee futures market by the Bogota Group, which includes several Central, North, and South American coffee producing countries. Until the Bogota Group issue is resolved, no further U.S. Congressional action regarding ICA implementing legislation is expected, and the United States will oppose any revision in the ICA's economic provisions, including the trigger price. The U.S. view is that continuation of unilateral market activities by producers is inconsistent with the spirit of the ICA.

The 69th annual convention of the National Coffee Association (NCA) was held in Boca Raton, Florida, in February 1980. Representatives from 140 NCA member companies and 20 foreign countries were among the more than 800 delegates registered for the meeting. The president of the NCA delivered the keynote address under the theme "Coffee Takes Stock--Now the Eighties," which reviewed events of the past decade and prospects for the future.

A principal speaker at the convention was the Deputy Assistant U.S. Secretary of State for International Resources and Food Policy, who discussed global trends in coffee supply and consumption over the past few years and cited the Brazilian frost of 1975 as the single most important factor during that period. Turning to the ICO, he was critical of the Bogota Group's actions, and stressed the adverse impact such activities

created for U.S. Congressional approval of ICA implementing legislation. Speaking on behalf of the Bogota Group, the president of the Brazilian Coffee Institute indicated producer countries are confronted with rising costs for labor, land, energy, and other inputs, and believe adequate earnings are necessary in order to make investments required to insure adequate supplies in the future.

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COFFEE, GREEN: TOTAL PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1970/71-1974/75; ANNUAL 1975/76-1979/80 ^{1/}
(IN THOUSANDS OF 60 KILOGRAM BAGS) ^{2/}

REGION AND COUNTRY	AVERAGE 1970/71-1974/75	1975/76	1976/77	1977/78	1978/79	1979/80
NORTH AMERICA:						
COSTA RICA.....	1,416	1,276	1,331	1,449	1,755	1,544
CUBA.....	472	415	450	425	450	450
DOMINICAN REPUBLIC.....	807	1,040	728	1,025	680	670
EL SALVADOR.....	2,549	2,530	2,973	2,400	3,423	2,700
GUATEMALA.....	2,187	2,043	2,613	2,350	2,800	2,550
HAITI.....	575	575	511	544	468	650
HONOURAS.....	712	636	691	1,036	1,132	1,250
JAMAICA.....	24	34	17	23	14	35
MEXICO.....	3,629	3,856	3,650	3,500	4,081	3,800
NICARAGUA.....	663	790	852	967	1,004	850
PANAMA.....	79	66	78	105	103	100
TRINIDAD-TOBAGO.....	51	42	60	41	39	38
US-HAWAII.....	19	11	13	14	10	11
US-PUERTO RICO.....	208	191	145	199	159	161
TOTAL NORTH AMERICA.....	13,390	13,504	14,111	14,078	16,118	14,809
SOUTH AMERICA:						
BOLIVIA.....	91	124	108	118	122	130
BRAZIL.....	20,380	23,000	9,300	17,500	20,000	22,500
COLOMBIA.....	8,120	8,500	9,300	11,050	12,268	12,000
ECUADOR ^{3/}	1,143	1,244	1,690	1,238	1,839	1,704
GUYANA.....	12	15	17	17	17	18
PARAGUAY.....	76	139	41	71	144	120
PERU.....	1,035	881	947	1,050	1,100	1,265
VENEZUELA.....	978	923	656	1,061	1,019	1,150
TOTAL SOUTH AMERICA.....	31,835	34,826	22,059	32,105	36,509	38,887
AFRICA:						
ANGOLA.....	3,528	1,180	1,131	1,247	613	700
BENIN.....	29	19	17	3	3	5
BURUNDI.....	391	279	359	285	387	360
CAMEROON.....	1,433	1,482	1,307	1,371	1,484	1,600
CENTRAL AFRICAN EMPIRE.....	185	150	166	165	80	180
CONGO, BRAZZAVILLE.....	13	28	33	46	107	70
EQUATORIAL GUINEA.....	113	90	90	80	90	100
ETHIOPIA.....	2,427	2,677	2,882	3,243	3,279	3,280
GABON.....	10	1	7	3	6	8
GHANA.....	59	56	70	35	58	58
GUINEA.....	79	23	39	16	60	50
IVORY COAST.....	4,280	5,266	4,867	3,320	4,667	4,167
KENYA.....	1,122	1,244	1,687	1,417	1,241	1,395
LIBERIA.....	79	88	156	137	137	150
MADAGASCAR.....	1,139	1,141	984	1,292	723	1,300
NIGERIA.....	54	67	53	53	50	50
RWANDA.....	324	434	531	362	311	380
SERRA LEONE.....	131	64	168	77	217	166
TANZANIA.....	874	959	805	835	856	900
TOGO.....	172	151	177	82	128	150
UGANDA.....	3,265	2,214	2,664	1,868	1,854	2,200
ZAIRE (CONGO,K).....	1,385	1,072	1,437	1,279	1,300	1,400
TOTAL AFRICA.....	21,093	18,684	19,630	17,216	17,651	18,669
ASIA:						
INDIA.....	1,589	1,498	1,791	2,221	1,857	2,300
INDONESIA.....	2,425	3,049	3,214	3,221	4,649	4,750
MALAYSIA.....	84	135	125	121	142	145
PHILIPPINES.....	493	483	550	575	600	660
PORTUGUESE TIMOR.....	63	75	65	75	4/	4/
VIETNAM.....	55	60	60	65	70	70
YEMEN, ARAB REP.....	52	45	45	50	50	50
TOTAL ASIA.....	4,761	5,345	5,850	6,328	7,368	7,975
OCEANIA:						
NEW CALEDONIA.....	27	25	25	25	25	25
PAPUA NEW GUINEA.....	556	635	700	674	730	700
TOTAL OCEANIA.....	583	660	725	699	755	725
WORLD TOTAL.....	71,663	73,020	62,375	70,426	78,401	81,065

^{1/} Coffee marketing year begins about July in some countries and in others about October. ^{2/} 132,276 pounds. ^{3/} As indicated in footnote 1, the coffee marketing year begins in some countries as early as July. Ecuador is one of these countries. Hence, the crop harvested principally during June-October 1978 in that country is shown as production for the 1978/79 marketing year. In Ecuador, however, this is referred to as the 1977/78 crop. ^{4/} Beginning 1978/79 included in Indonesia.

NOTE: Production estimates for some countries include cross-border movements. Also, due to rounding, country totals may not add to area and world totals.

Source: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

COFFEE, GREEN: EXPORTABLE PRODUCTION IN SPECIFIED COUNTRIES - AVERAGE 1970/71-1974/75, ANNUAL 1975/76-1979/80
(IN THOUSANDS OF 60 KILOGRAM BAGS) 2/

REGION AND COUNTRY	AVERAGE 1970/71-1974/75	1975/76	1976/77	1977/78	1978/79	1979/80
NORTH AMERICA:						
COSTA RICA.....	1,265	1,104	1,147	1,264	1,535	1,319
CUBA.....	--	--	--	--	--	--
DOMINICAN REPUBLIC.....	526	755	481	755	400	390
EL SALVADOR.....	2,382	2,350	2,788	2,210	3,228	2,500
GUATEMALA.....	1,924	1,753	2,315	2,045	2,490	2,235
HAITI.....	353	350	270	304	228	405
HONDURAS.....	617	532	587	929	1,028	1,142
JAMAICA.....	6	21	8	17	6	28
MEXICO.....	2,045	2,456	2,400	2,100	2,881	2,500
NICARAGUA.....	587	714	774	887	921	765
PANAMA.....	18	3	13	38	35	32
TRINIDAD-TOBAGO.....	39	31	45	27	25	23
US-HAWAII.....	--	--	--	--	--	--
US-PUERTO RICO.....	--	--	--	--	--	--
TOTAL NORTH AMERICA.....	9,760	10,068	10,828	10,576	12,777	11,339
SOUTH AMERICA:						
BOLIVIA.....	67	95	80	87	89	96
BRAZIL.....	12,536	15,000	1,800	10,000	12,000	14,000
COLOMBIA.....	6,716	7,100	7,900	9,500	10,668	10,350
ECUADOR 3/.....	998	1,079	1,515	1,043	1,636	1,492
GUYANA.....	--	--	--	--	--	--
PARAGUAY.....	53	114	15	45	117	93
PERU.....	801	631	697	800	850	1,015
VENEZUELA.....	305	222	189	271	179	230
TOTAL SOUTH AMERICA.....	21,475	24,241	12,196	21,746	25,539	27,276
AFRICA:						
ANGOLA.....	3,434	1,100	267	1,172	533	620
BENIN.....	28	18	16	2	2	4
BURUNDI.....	389	276	357	282	384	357
CAMEROON.....	1,407	1,455	1,281	1,344	1,456	1,570
CENTRAL AFRICAN EMPIRE.....	175	139	155	153	68	166
CONGO, BRAZZAVILLE.....	12	27	32	45	106	69
EQUATORIAL GUINEA.....	103	80	80	70	80	90
ETHIOPIA.....	1,137	1,011	1,049	1,354	1,379	1,380
GABON.....	9	--	6	2	5	7
GHANA.....	47	41	55	25	49	52
GUINEA.....	75	17	33	10	54	44
IVORY COAST.....	3,754	5,107	4,782	3,284	4,625	4,117
KENYA.....	1,097	1,224	1,644	1,367	1,200	1,353
LIBERIA.....	73	79	146	126	126	138
MAOAGASCAR.....	1,001	1,001	851	1,152	578	1,152
NIGERIA.....	14	18	--	--	--	--
RWANDA.....	322	432	529	360	309	378
SIERRA LEONE.....	126	59	163	72	212	161
TANZANIA.....	853	934	780	814	836	880
TOGO.....	171	150	176	81	127	149
UGANDA.....	3,243	2,192	2,634	1,838	1,824	2,170
ZAMBIA (CONGO,K).....	1,253	922	1,270	1,104	1,120	1,210
TOTAL AFRICA.....	18,724	16,282	16,306	14,657	15,073	16,067
ASIA:						
INDIA.....	882	749	941	1,317	1,006	1,375
INDONESIA.....	1,488	2,033	2,400	2,702	3,865	3,950
MALAYSIA.....	--	39	39	--	20	20
PHILIPPINES.....	27	142	242	250	242	270
PORTUGUESE TIMOR.....	55	65	55	65	4/	4/
VIETNAM.....	25	30	30	30	35	35
YEMEN, ARAB REP.....	42	35	35	40	40	40
TOTAL ASIA.....	2,519	3,093	3,742	4,404	5,208	5,690
OCEANIA:						
NEW CALEDONIA.....	17	15	15	14	14	14
PAPUA NEW GUINEA.....	546	621	685	659	716	686
TOTAL OCEANIA.....	563	636	700	673	730	700
WORLD TOTAL.....	53,041	54,320	43,773	52,056	59,327	61,072

-- Denotes negligible, unknown, or not available.

1/ Coffee marketing year begins about July in some countries and in others about October. Exportable production represents total harvested production minus estimated domestic consumption. 2/ 132,276 pounds. 3/ As indicated in footnote 1, the coffee marketing year begins in some countries as early as July. Ecuador is one of these countries. Hence, the crop harvested principally during June-October 1978 in that country is shown as production for the 1978/79 marketing year. In Ecuador, however, this is referred to as the 1977/78 crop. 4/ Beginning 1978/79 included in Indonesia.

NOTE: Production estimates for some countries include cross-border movements. Also, due to rounding, country totals may not add to area and world totals.

Source: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

GREEN COFFEE: VALUE OF EXPORTS BY SPECIFIED PRODUCING COUNTRIES

1974-78 1/
(In million U.S. dollars)

Country	1974	1975	1976	1977	1978 <u>2/</u>
Costa Rica.....	125	97	154	319	307
Dominican Republic...	30	43	103	185	118
El Salvador.....	161	230	403	744	469
Guatemala.....	173	164	243	526	475
Haiti.....	16	23	51	70	49
Honduras.....	44	57	101	169	212
Mexico.....	170	184	393	512	364
Nicaragua.....	46	48	119	199	203
Brazil.....	864	855	2,173	2,299	1,947
Colombia.....	623	675	967	1,513	2,136
Ecuador.....	68	67	208	160	263
Peru.....	35	49	106	197	168
Venezuela.....	23	18	38	51	46
Angola.....	229	200	149	254	227
Ethiopia.....	73	74	155	265	306
Ivory Coast.....	297	287	617	924	783
Kenya.....	107	99	220	482	319
Tanzania.....	53	65	155	224	155
Uganda.....	231	212	298	547	313
India.....	75	85	142	280	205
Indonesia.....	98	100	238	599	491
Total specified: countries.....	3,541	3,632	7,033	10,519	9,556

1/ Coffee exports from these countries represent around 90 percent of total world exports. 2/ Preliminary.

Source: Compiled from official statistics of foreign governments, reports of agricultural attaches and Foreign Service Officers, trade reports, and other related source materials.

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Commodity Programs, FAS/USDA

GREEN COFFEE: U.S. IMPORTS, BY COUNTRY OF ORIGIN,
QUANTITY AND VALUE, 1978 AND 1979

Continent and Country	1978		1979 1/	
	60 Kg Bags 2/	1,000 Dollars	60 Kg Bags 2/	1,000 Dollars
North America:				
Costa Rica.....	334,415	69,613	515,699	109,177
Dominican Republic.....	460,591	101,923	548,009	124,705
El Salvador.....	627,088	113,773	1,123,406	212,821
Guatemala.....	942,485	202,028	1,267,598	252,297
Haiti.....	61,151	12,148	32,146	6,192
Honduras.....	534,931	119,513	547,084	101,352
Mexico.....	1,389,595	272,237	1,934,418	391,660
Nicaragua.....	147,128	33,234	193,944	35,733
Panama.....	41,809	9,946	28,689	5,833
Trinidad and Tobago.....	14,508	2,653	2,690	445
Other.....	14,738	3,249	4,652	1,055
Total North America.....	4,568,439	940,317	6,198,335	1,241,270
South America:				
Brazil.....	2,694,226	644,961	1,890,483	388,537
Colombia.....	2,807,996	680,538	3,890,865	785,062
Ecuador.....	1,044,396	193,246	638,057	128,729
Peru.....	654,307	125,072	954,493	197,825
Venezuela.....	238,583	45,488	121,010	19,891
Other.....	226,979	37,208	789,411	151,641
Total South America.....	7,666,487	1,726,513	8,284,319	1,671,685
Africa:				
Angola.....	303,559	53,244	40,052	6,698
Burundi.....	172,974	28,225	195,246	36,259
Cameroon.....	208,705	38,244	182,559	32,528
Ethiopia.....	461,142	91,956	549,166	104,896
Ivory Coast.....	774,706	148,050	833,920	154,337
Kenya.....	106,668	20,509	57,848	11,812
Madagascar.....	406,363	76,812	261,403	45,752
Rwanda.....	230,838	45,064	167,409	37,713
Tanzania.....	333,972	61,206	172,280	30,074
Uganda.....	437,925	81,330	360,763	81,732
Zaire.....	597,527	110,593	84,396	16,906
Other.....	154,015	31,206	179,528	34,728
Total Africa.....	4,188,394	786,439	3,084,570	593,435
Asia and Oceania:				
India.....	276,889	48,539	297,592	55,423
Indonesia.....	1,176,725	178,691	1,294,186	209,588
Papua New Guinea.....	169,020	31,949	103,538	22,099
Other.....	73,149	12,361	104,814	17,879
Total Asia and Oceania....	1,695,783	271,540	1,800,130	304,989
Other Countries.....	13,674	3,490	28,729	7,597
Grand Total.....	18,132,777	3,728,299	19,396,083	3,818,976

1/ Preliminary. 2/ 132.276 pounds each.

Source: Compiled from U.S. Department of Commerce, Bureau of Census data.

April 1980

Commodity Programs, FAS/USDA

GREEN COFFEE: U.S. GROSS IMPORTS FOR CONSUMPTION BY MONTHS, 1975-79
(In 60 kilogram bags)

Month	1975	1976	1977	1978	1979 1/
January.....	1,851,613	1,664,327	1,994,147	1,682,045	1,747,330
February.....	1,656,028	1,743,777	1,706,674	1,574,583	1,353,257
March.....	1,534,871	2,311,082	1,839,178	1,707,452	1,630,811
April.....	1,448,487	1,636,324	1,824,133	1,556,739	2,036,535
May.....	1,365,017	1,546,394	1,223,533	1,345,237	1,618,619
June.....	1,735,631	1,863,977	1,136,816	1,249,290	1,617,283
January-June.....	9,591,647	10,765,881	9,724,481	9,115,346	10,003,835
July.....	1,625,743	1,909,138	755,821	1,315,844	1,596,934
August.....	1,867,525	1,636,634	695,029	1,123,721	1,404,349
September.....	2,533,330	956,398	678,095	1,337,360	1,631,848
October.....	1,783,726	1,012,923	635,077	1,901,294	1,273,073
November.....	1,587,478	1,648,566	971,964	1,688,512	1,592,806
December.....	1,299,058	1,858,301	1,347,223	1,650,700	1,893,238
July-December.....	10,696,860	9,021,960	5,083,209	9,017,431	9,392,248
Calendar year.					
Total.....	20,288,507	19,787,841	14,807,690	18,132,777	19,396,083

1/ Preliminary. 2/ Year ending September 30 of year shown; ICO is International Coffee Organization.

Source: Compiled from U.S. Department of Commerce, Bureau of Census data.

April 1980

Commodity Programs, FAS/USDA

GREEN COFFEE: U.S. GROSS IMPORTS BY COUNTRY OR AREA OF ORIGIN
AVERAGE 1970-74, ANNUAL 1976-79

	Average	1970-74	1976	1977	1978	1979 1/
	Mil. bags 2/	Per- cent	Mil. bags 2/	Per- cent	Mil. bags 2/	Per- cent
Brazil.....	4.84	23	3.09	16	2.69	15
Africa and Asia.....	7.73	38	7.29	37	5.88	32
Europe.....	.03	3/	.03	3/	.01	3/
Mild Coffees:						
Colombia.....	2.76	13	2.69	13	2.81	16
Other South America.....	1.20	6	1.52	8	2.17	12
Mexico and Central America.....	3.52	17	4.40	22	4.02	22
Caribbean.....	.56	3	.76	4	.55	3
Total Milds.....	8.04	39	9.37	47	7.74	52
Total World.....	20.64	100	19.78	100	18.13	100
1/ Preliminary. 2/ 60 kilogram bags of 132.276 pounds each. 3/ Less than one-half of one percent.						

Source: Compiled from U.S. Department of Commerce, Bureau of Census data.

April 1980

Commodity Programs, FAS/USDA

COFFEE: UNITED STATES TRADE, QUANTITY AND VALUE, 1975-1979

	1975	1976	1977	1978	1979					
	1,000 Bags 1/ Dollars	1,000 Bags 1/ Dollars	1,000 Bags 1/ Dollars	1,000 Bags 1/ Dollars	1,000 Bags 1/ Dollars					
<u>Imports</u>										
Green.....	20,289	1,561,701	19,788	2,633,207	14,808	3,860,998	18,133	3,728,299	19,396	3,818,976
Roasted <u>2/</u>	325	25,317	372	46,479	450	98,660	414	70,264	508	81,622
Soluble <u>2/</u>	1,107	86,272	1,550	177,585	1,260	282,485	1,226	235,796	1,517	255,168
Total.....	21,721	1,673,290	21,710	2,857,271	16,518	4,242,143	19,773	4,034,359	21,421	4,155,766
<u>Exports</u>										
Green.....	142	12,169	120	16,664	171	23,154	146	35,511	88	18,366
Roasted <u>2/</u>	166	20,591	122	20,818	209	31,707	119	39,365	121	38,255
Soluble <u>2/</u>	217	26,353	114	15,100	138	25,350	163	39,204	387	88,138
Total.....	525	59,113	356	52,582	518	80,211	428	114,080	596	144,759
<u>Reexports</u>										
Green.....	618	50,590	905	131,019	1,404	362,009	717	163,144	1,110	247,561
Roasted <u>2/</u>	17	1,869	24	4,061	24	4,105	11	3,419	8	2,797
Soluble <u>2/</u>	38	3,083	47	5,583	43	10,069	42	7,021	67	12,051
Total.....	673	55,542	976	140,663	1,471	376,183	770	173,584	1,185	262,409
<u>1/</u> 60 kilogram bags of 132.276 pounds each. <u>2/</u> Converted to bags of green bean equivalent (GBE) at 1.19 pounds green to 1 pound roasted and 3.0 pounds green to 1 pound soluble.										

1/ 60 kilogram bags of 132.276 pounds each. 2/ Converted to bags of green bean equivalent (GBE) at 1.19 pounds green to 1 pound roasted and 3.0 pounds green to 1 pound soluble.

Source: Compiled from U.S. Department of Commerce, Bureau of Census data.

April 1980

Commodity Programs, FAS/USDA

WORLD COFFEE SUPPLY AND DISTRIBUTION, 1960-1980

(IN 1,000 60-KG BAGS)

COUNTRY BY TIME PERIOD	BEGINNING STOCKS	PRODUCTION	IMPORTS	TOTAL SUPPLY DISTRIBUTN	DOMESTIC USE	EXPORTS			ENDING STOCKS
						BEANS	RSTD/GRND	SOLUBLE TOTAL	
WORLD TOTAL									
1960/61.....	58,806	65,374	215	124,395	16,270	42,846	63	92 43,003	65,123
1961/62.....	65,123	75,950	191	141,264	20,985	45,959	56	135 46,151	74,128
1962/63.....	74,128	67,787	162	142,077	14,591	46,778	42	123 46,946	80,538
1963/64.....	80,538	65,338	91	145,967	17,524	50,883	69	118 51,070	77,371
1964/65.....	77,371	52,649	89	130,109	16,650	41,765	58	78 41,902	71,556
1965/66.....	71,556	82,153	144	153,853	17,697	49,669	37	257 49,965	86,188
1966/67.....	86,188	63,380	158	149,726	19,128	48,324	26	564 48,915	81,684
1967/68.....	81,684	70,877	155	152,716	17,950	54,935	55	741 55,732	79,039
1968/69.....	79,039	63,316	115	142,470	19,528	52,542	76	963 53,582	69,360
1969/70.....	69,360	69,713	181	139,254	18,789	53,875	84	1,161 55,119	65,346
1970/71.....	65,346	58,979	179	124,504	19,278	50,280	107	1,253 51,641	53,588
1971/72.....	53,588	73,679	211	127,478	18,951	56,431	258	1,589 58,279	50,246
1972/73.....	50,246	77,033	206	127,485	17,365	58,723	381	2,045 61,150	48,974
1973/74.....	48,974	66,115	288	115,377	19,028	58,080	163	2,149 60,391	35,958
1974/75.....	35,958	82,508	293	118,759	19,145	53,099	241	1,985 55,326	44,288
1975/76.....	44,288	73,021	245	117,554	18,846	56,748	394	2,164 59,309	39,402
1976/77.....	39,402	62,376	246	102,024	18,732	55,264	304	2,176 57,743	25,548
1977/78.....	25,548	70,426	304	96,278	18,488	46,546	176	1,292 48,012	29,778
1978/79.....	29,778	78,401	268	108,447	19,228	60,708	101	2,468 63,276	25,943
1979/80.....	25,943	81,065	293	107,301	20,141	58,558	146	2,541 61,244	25,916

NOTE: TOTAL MAY NOT ADD BECAUSE OF ROUNDING, -- DENOTES UNAVAILABLE, NEGLIGIBLE, OR ZERO

MARCH 1980

HORTICULTURAL AND TROPICAL PRODUCTS DIVISION
COMMODITY PROGRAMS, FAS, USDA

**UNITED STATES DEPARTMENT OF AGRICULTURE
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